

Chapter 3: Oil and Oil Products

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Key headlines

In 2025, UK production of primary oils rose by 2.4 per cent to just over 31 million tonnes with a longer term trend of decline from the mature North Sea basin. Net imports of primary oils fell by 18 per cent to 16 million tonnes.

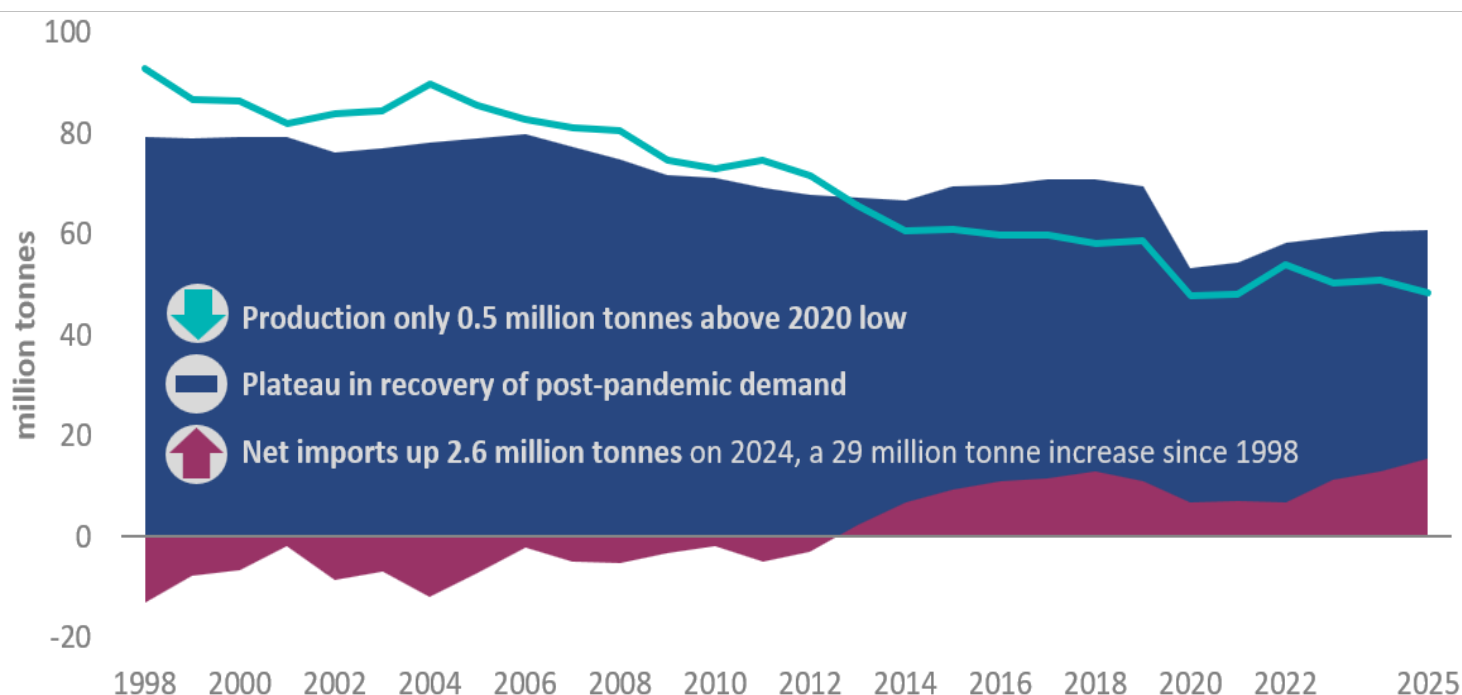
Refinery production remained low at 48 million tonnes, only 0.5 million tonnes higher than the low of pandemic 2020. The UK was a net importer of products by 16 million tonnes in 2025, the highest figure since the UK became a net importer in 2013.

Overall demand for products remained stable compared to 2024. Total jet fuel demand decreased by 0.8 per cent, making 2025 the first year that jet fuel demand did not increase since 2021.

The UK held 11.2 million tonnes of oil stocks and exceeded the 90 days of net imports required by the International Energy Agency (IEA). **UK oil stocks were similar to 2024 with a decrease of 0.5 per cent.**

Total demand for petroleum products remained stable in 2025 compared to 2024 (total demand includes transformation, energy industry use and final consumption). While a 0.2 per cent increase means that 2025 had the highest annual demand since the onset of the COVID-19 pandemic (61 million tonnes), this represents a plateau in post-pandemic demand recovery and levels remain 9.9 per cent lower than pre-pandemic 2019.

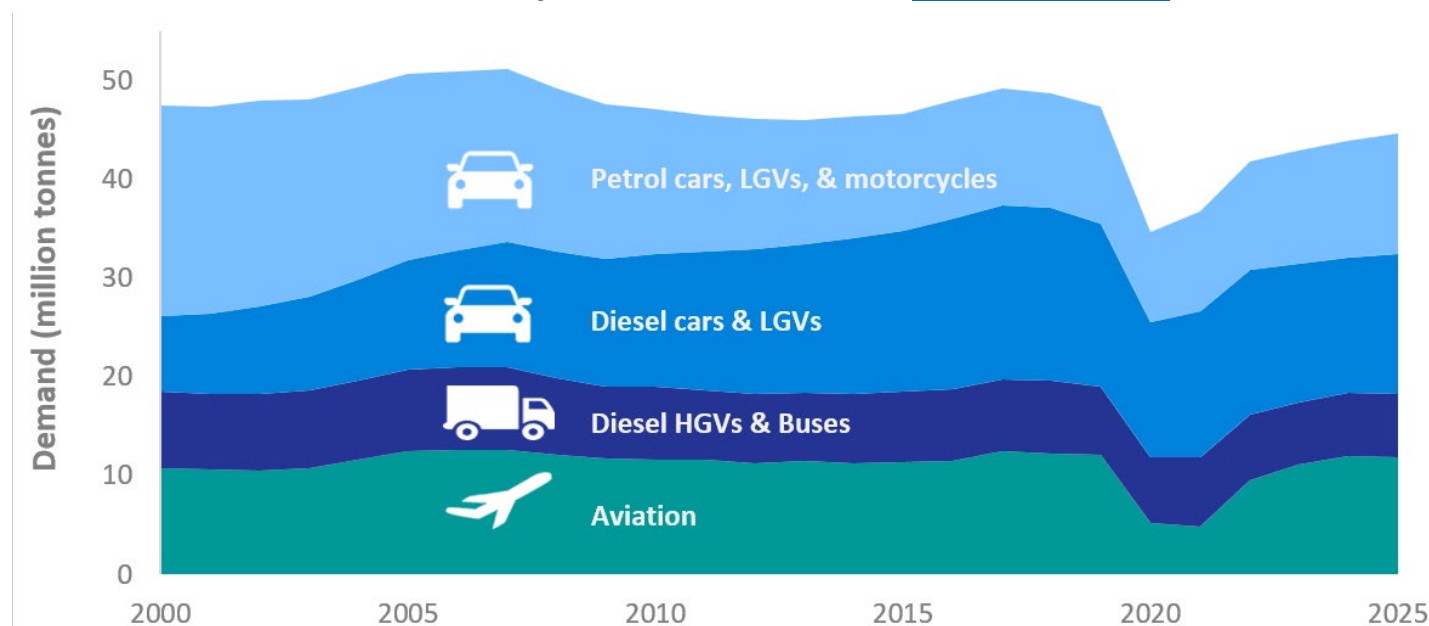
Chart 3.1 Supply and demand for petroleum products, 1998 to 2025 [DUKES Table 3.2](#)



Refinery production was down by 4.8 per cent compared to 2024, only 0.5 million tonnes higher than the low of 2020, and 56 per cent of that seen in 2000¹. This is partly due to the closure of refinery operations at both the Grangemouth and Lindsey oil refineries in 2025. Compared to 2019, production in 2025 was down by 18 per cent. This corresponds with a 9.9 per cent fall in demand and a 40 per cent increase in net imports since 2019.

The UK was a net importer of products in 2025 by 15.5 million tonnes, an increase of a fifth on the previous year and the highest level since the UK became a net importer in 2013. This increase was because a 7.6 per cent decrease in product exports and a 3.6 per cent increase in imports were required to meet stable demand amid reduced production.

Chart 3.2 Annual demand for transport fuels, 2000 to 2025² [DUKES Table 3.2](#)



Transport demand was up by 1.9 per cent compared to 2024, again accounting for three quarters of total UK product demand. Transport demand had dipped in 2020 by 13 million tonnes compared to 2019 due to travel restrictions that were put in place to curb the spread of COVID-19. It has since seen strong recovery, being up 29 per cent on 2020, but remains 5.8 per cent below pre-pandemic 2019.

Over 45 per cent of transport fuel demand was accounted for by diesel vehicles – cars, goods vehicles and buses. Nonetheless, diesel demand has not shown the post-pandemic recovery that petrol and jet fuel have but rather has continued decreasing steadily since a peak of 25 million tonnes in 2017. From 2000 to 2017, demand from diesel vehicles increased by 63 per cent. From 2017 to 2025, demand fell by almost one fifth. This is partly due to an increase in biodiesel, but also the increasing popularity of electric vehicles, and motorists switching away from diesel due to environmental concerns since the emissions scandal around 2017 to 2018³.

Just over 70 per cent (72 per cent) of transport demand was for road fuels, up by 0.7 percentage points on 2024.

Hydrocarbon jet fuel demand remained within two per cent of pre-pandemic levels in 2019. While down by 0.8 per cent compared to 2024⁴, this was a decrease of only just over 90 thousand tonnes. The

¹ See Annex 2 for a map and further detail on UK refinery nameplate capacities in the [methodology note](#)

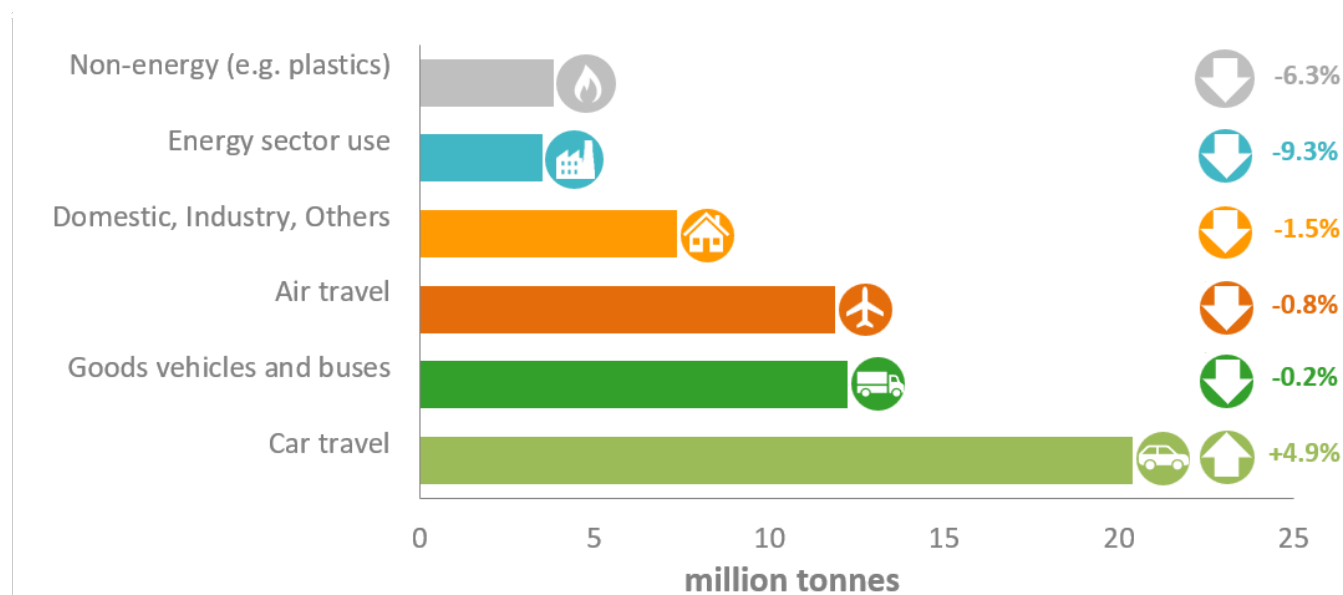
² See UK [Energy in Brief](#) for detailed breakdown of fuel consumption by vehicle type

³ For further analysis see Energy Trends special article [Road Diesel Demand Drivers](#) (DESNZ, June 2025)

⁴ Jet demand was down by 0.8 per cent when Sustainable Aviation Fuel is both included and excluded in the total. See Table 1.1 of DUKES.

COVID-19 pandemic brought restrictions on air travel which caused jet fuel demand to drop by more than half between 2019 and 2020. In 2021 demand dropped again, to its lowest level since 1984, before more than doubling by 2024. While dropping slightly in 2025, it remained within two per cent of pre-pandemic demand in 2019.

Chart 3.3 Oil consumption in the UK, 2025 [DUKES Table 3.2](#)



Petroleum product demand remained stable, rising by just 0.2 per cent. Within this, final consumption increased by a marginal 0.8 per cent.

Demand for burning oil – which is primarily used for heating applications – increased by 3.2 per cent in 2025. This was despite temperatures being comparable – even slightly higher – than the year before. In recent years, demand for heating oil (mainly burning oil) has followed price fluctuations more closely than changes in temperature. It is typical for consumers to purchase in bulk when prices are low, as was seen in 2020. Conversely, when the Russian invasion of Ukraine caused prices to rise demand dropped away sharply. Moving forward, price reductions in 2023, 2024 and 2025 meant that demand rose by 8.4, 7.1 and 3.2 per cent in each year respectively.

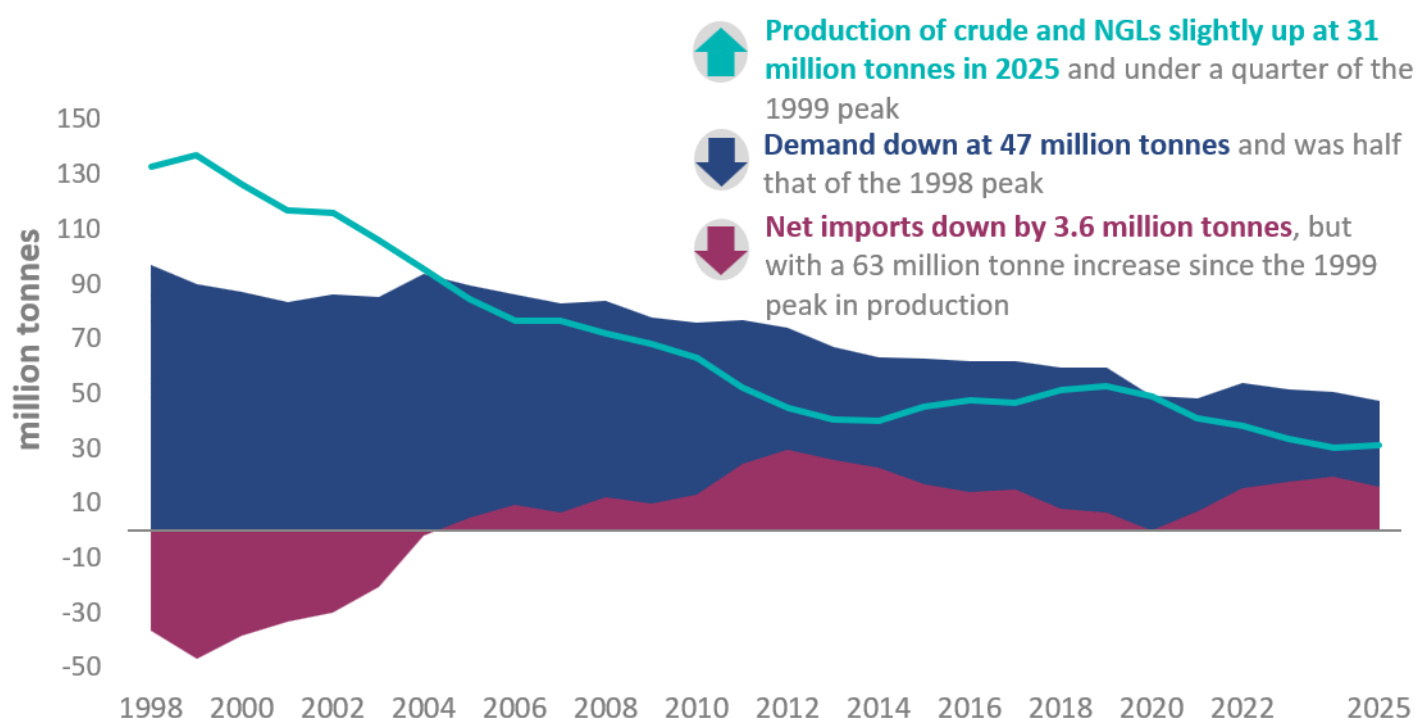
Even though burning oil composes 88 per cent of the domestic sector, overall domestic demand decreased by 1.3 per cent, potentially as consumers seek installation of new heating technologies such as heat pumps. Public administration and agriculture saw decreases of 2.6 and 3.5 per cent, respectively.

Industry demand for all products decreased by 2.2 per cent in 2025. Over the longer-term, industry oil demand has fallen by nearly two-thirds since the year 2000. Improvements in energy efficiency and a move from traditional manufacturing to higher value processes have contributed to the drop. The commercial sector remained stable, with non-energy use decreasing 6.3 per cent, dropping below 4 million tonnes for the first time since records began.

Primary oil production stood at 31 million tonnes in 2025, up by 2.4 per cent on 2024 and in line with declining output from the mature North Sea basin. Offshore oil production began in the UK during the 1970s and peaked in 1999 at 137 million tonnes – current production is just under a quarter of that peak despite new fields temporarily providing a boost from 2015 until 2019. Production has been in decline since 2020, with a sharp drop in 2021 caused by planned extensive maintenance of the Forties Pipeline System, which transports a significant proportion of UK oil to onshore terminals.

Demand for primary oils was down by 5.1 per cent compared to 2024 following the closure of two refineries (Grangemouth and Lindsey) in 2025. With production up this led to an 18 per cent decrease in net imports, which stood at 16 million tonnes as imports fell by 9.2 per cent to 44 million tonnes while exports fell by 2.8 per cent to 27 million tonnes.

Chart 3.4 Supply and demand for primary oils, 1998 to 2025 [DUKES Table 3.1](#)



Note: Demand excludes transfers and stock changes

Refineries took receipt of 4.7 million tonnes of crude oil produced from the UK Continental Shelf in 2025, up by 17 per cent and accounted for 9.7 per cent of refinery demand in 2025⁵. Historically, UK refineries took receipt of more North Sea crude as a share of total supply but changes in maritime shipping fuel rules since 2020⁶, prices on the global market, and more recently the closure of Grangemouth and Lindsey refineries, meant more crude was imported - mainly from the US and Norway.

In 2025, as in the previous year, the United States was number one exporter of crude oil ahead of Norway to the UK by just over one million tonnes. Imports from the US accounted for under a third of total crude imports but were down by 26 per cent compared to 2024.

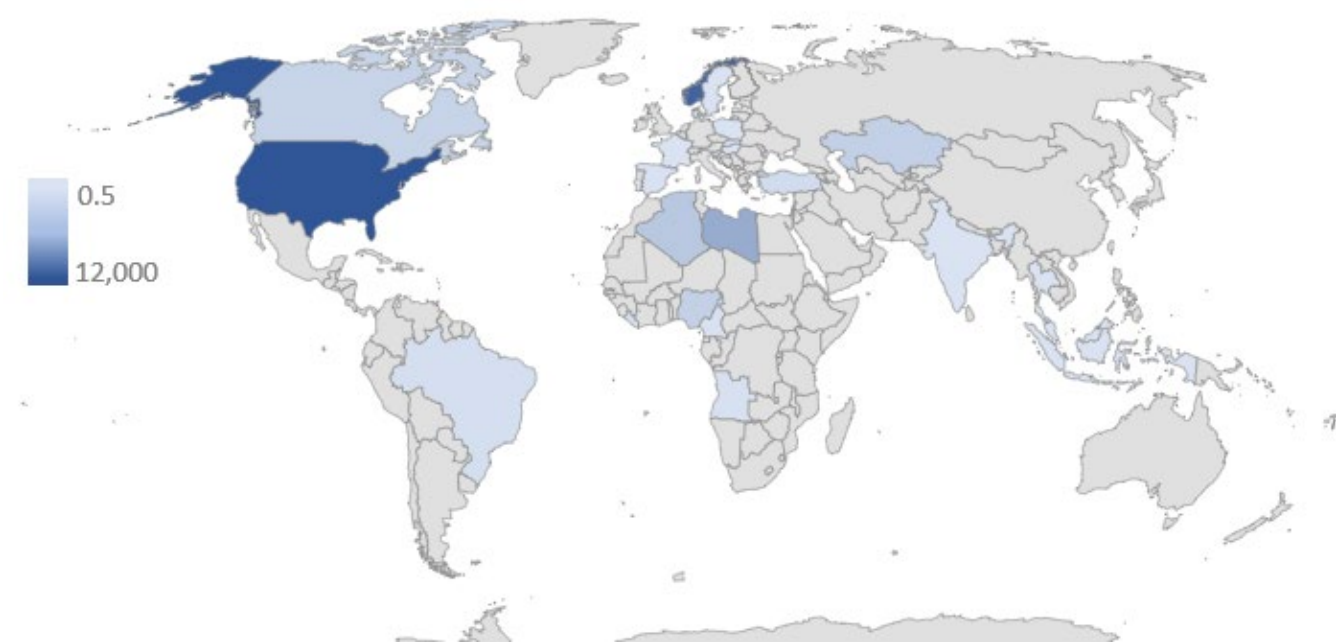
Norway was the second largest source of crude imports at 11 million tonnes, down 21 per cent on 2024, but still accounting for 27 per cent of the UK's imported crude.

The ban on imports of Russian oil introduced on 5th December 2022 forced importers to diversify and seek different crude sources. The UK has not imported any oil from Russia since the ban. Crude sourced from current OPEC countries increased by over a third from 2022 to 2023 following the ban and has remained stable around 8 million tonnes. In 2025, OPEC countries were the source of 21 per cent of UK crude imports. The UK also exports a significant amount of crude oil, mainly to the Netherlands and other European countries, but with crude exports down by 2.5 per cent compared to 2024.

⁵ See [Energy Trends Table 3.10](#)

⁶ [International Maritime Organization 2020, cutting sulphur oxide emissions](#)

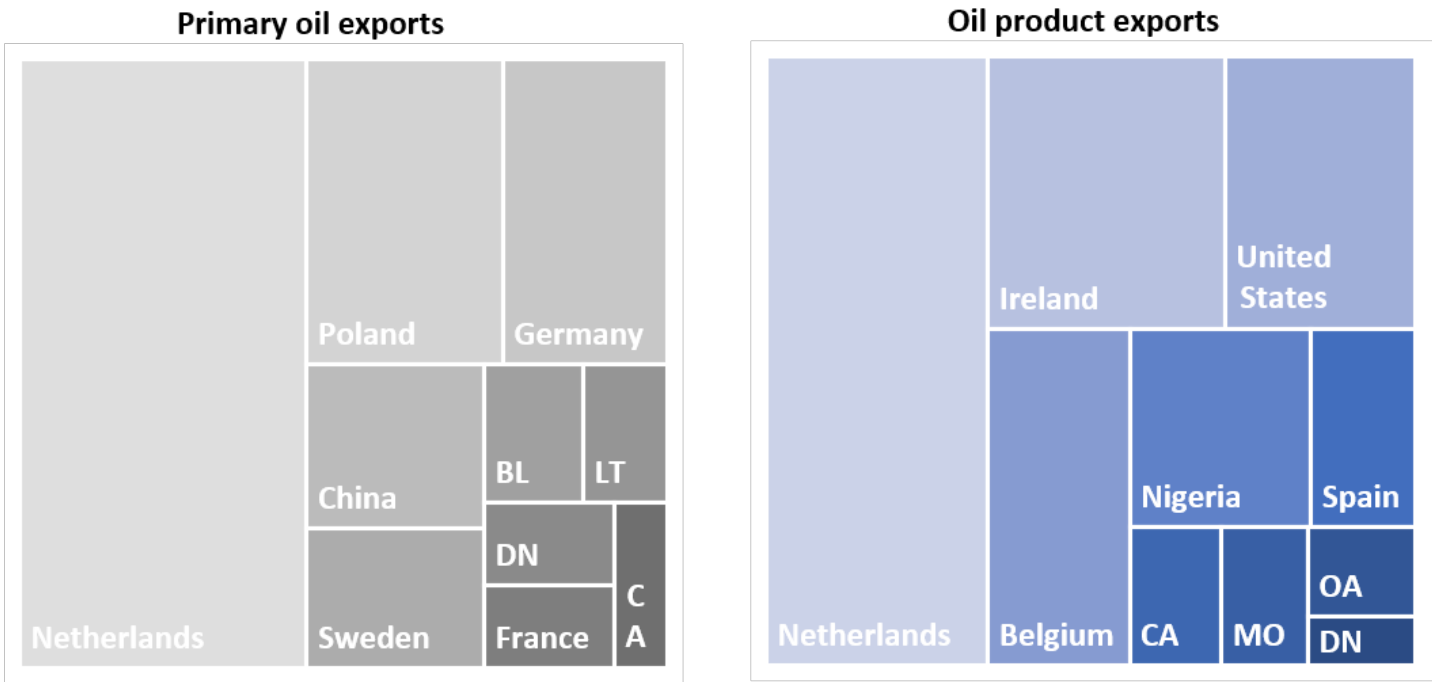
Map 3A Sources of UK crude oil imports 2025 (thousand tonnes) [DUKES Table 3.7](#)



UK exports of total primary oils were down by 2.8 per cent in 2025 compared to 2024, with nearly 90 per cent going to the EU and mainly to the refining hubs in the Netherlands where it is processed into road diesel, gas oil, and heating fuels – oil types that the UK relies on imports to meet demand.

Oil product exports decreased by 7.6 per cent in 2025 compared to 2024, with the majority (around 60 per cent) going to the EU. The UK is more than self-sufficient for petrol, so petrol is typically around half the product export total. In 2025 the UK exported 2.7 million tonnes of petrol to the Netherlands, 1.9 million tonnes to the US, and 1.3 million tonnes to Nigeria (together almost 70 per cent of petrol exports). While the UK is reliant on imports to meet demand for jet fuel, exports of 1.4 million tonnes to Ireland in 2025 were 89 per cent of total UK jet fuel exports.

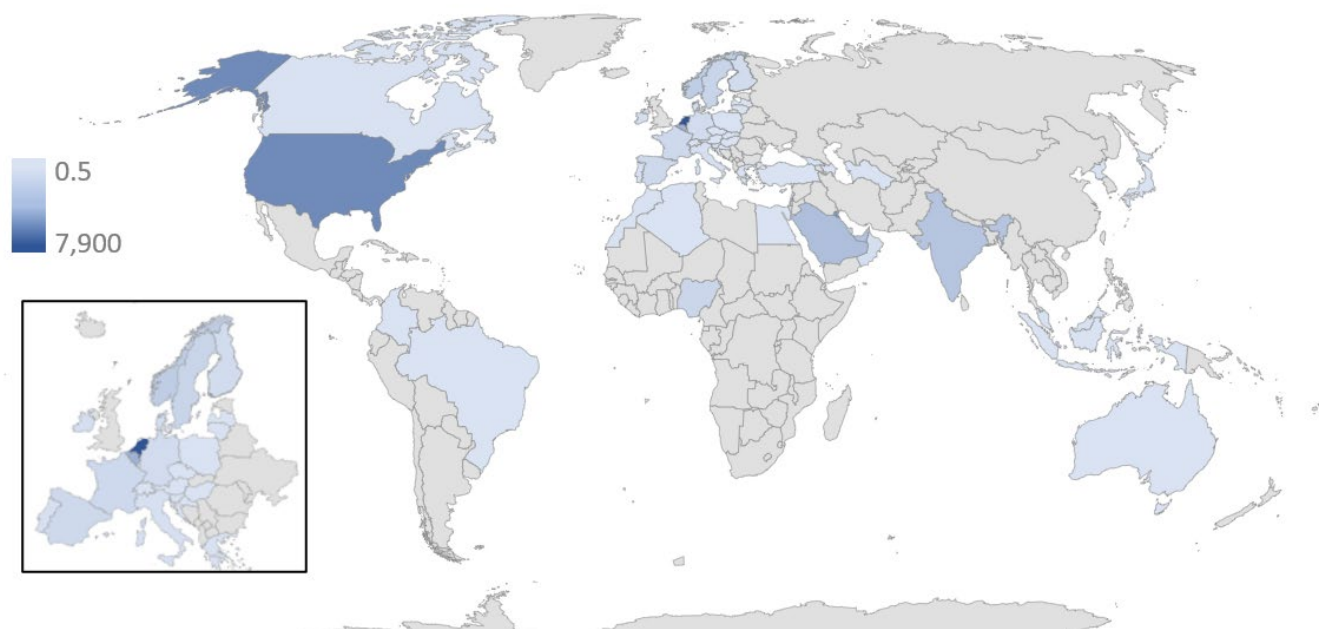
Chart 3.5 Major UK primary oil and oil product export destinations [DUKES Table 3.8](#)



Key
BL Belgium, CA Canada, DN Denmark, LT Lithuania, MO Morocco, OA Other Africa.

Overall petroleum product imports increased by 3.6 per cent compared to 2024, reflecting the stable demand and continued low refinery production. Just under 40 per cent of product imports were diesel, with the United States (31 per cent), the Netherlands (26 per cent) and Belgium (11 per cent) collectively making up just under 70 per cent of those imports, reflecting a change since the 2022 sanctions given that Russia used to be an important source of diesel for the UK.

Map 3B Sources of UK petroleum product imports 2025 (thousand tonnes) [DUKES Table 3.7](#)



The Netherlands is the UK's closest major oil refining and trading hub, so accounts for most oil trade with the UK. Dutch product imports represented almost a quarter of the total at 7.9 million tonnes, with the next highest source being the United States, accounting for 15 per cent of the total at 4.9 million tonnes. Imports from Kuwait have been increasing since 2022, and in 2025 Kuwait was the third largest source of product imports at 13 per cent (see information on jet fuel below).

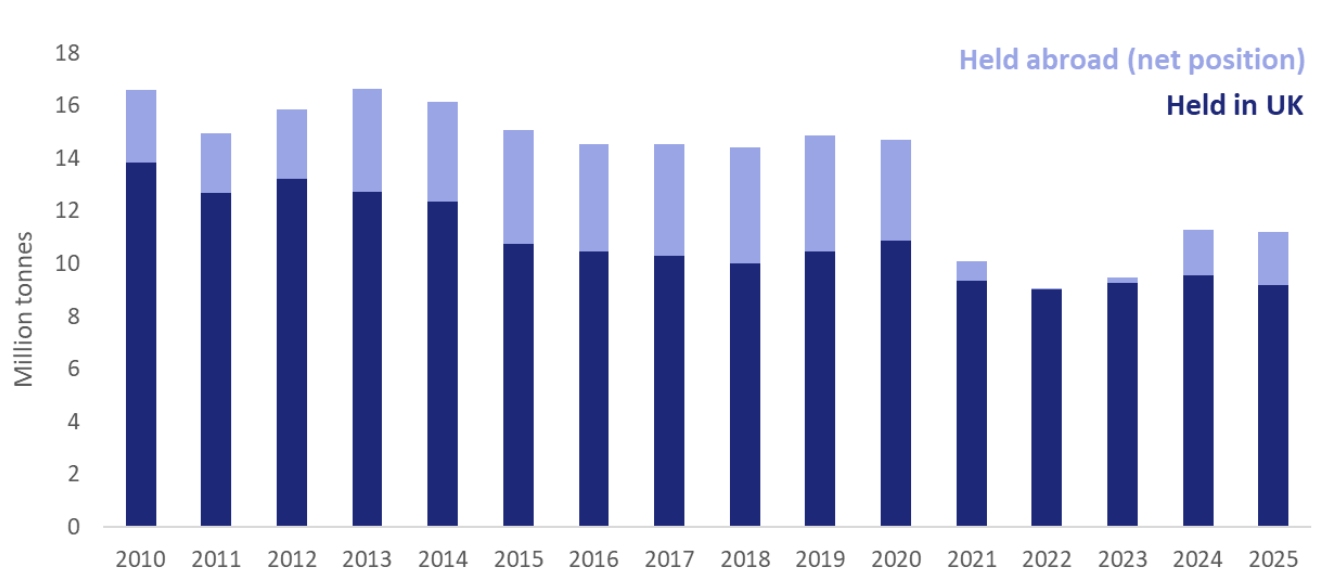
Jet fuel made up almost one-third of product imports and decreased by 1.0 per cent in 2025.

This was concurrent with a similar decrease in demand. In recent years, Kuwait has become the primary source of imported jet fuel for the UK, accounting for 35 per cent of the total at 3.7 million tonnes. India, Saudi Arabia and the UAE also each supplied more than one million tonnes.

The UK government is required to hold stocks of oil which can be released in the event of severe disruption to global supply. Government meets this obligation (under membership of the International Energy Agency) by directing industry to hold stocks. The UK participated in a co-ordinated release of oil in March 2026 in response to the US-Iran conflict that has caused major supply disruption. For more up to date stock information please see Energy Trends Table 3.11⁷.

⁷ See [Energy Trends Table 3.11](#)

Chart 3.6 UK oil stocks, 2010 to 2025 ([DUKES Table 3.5](#))



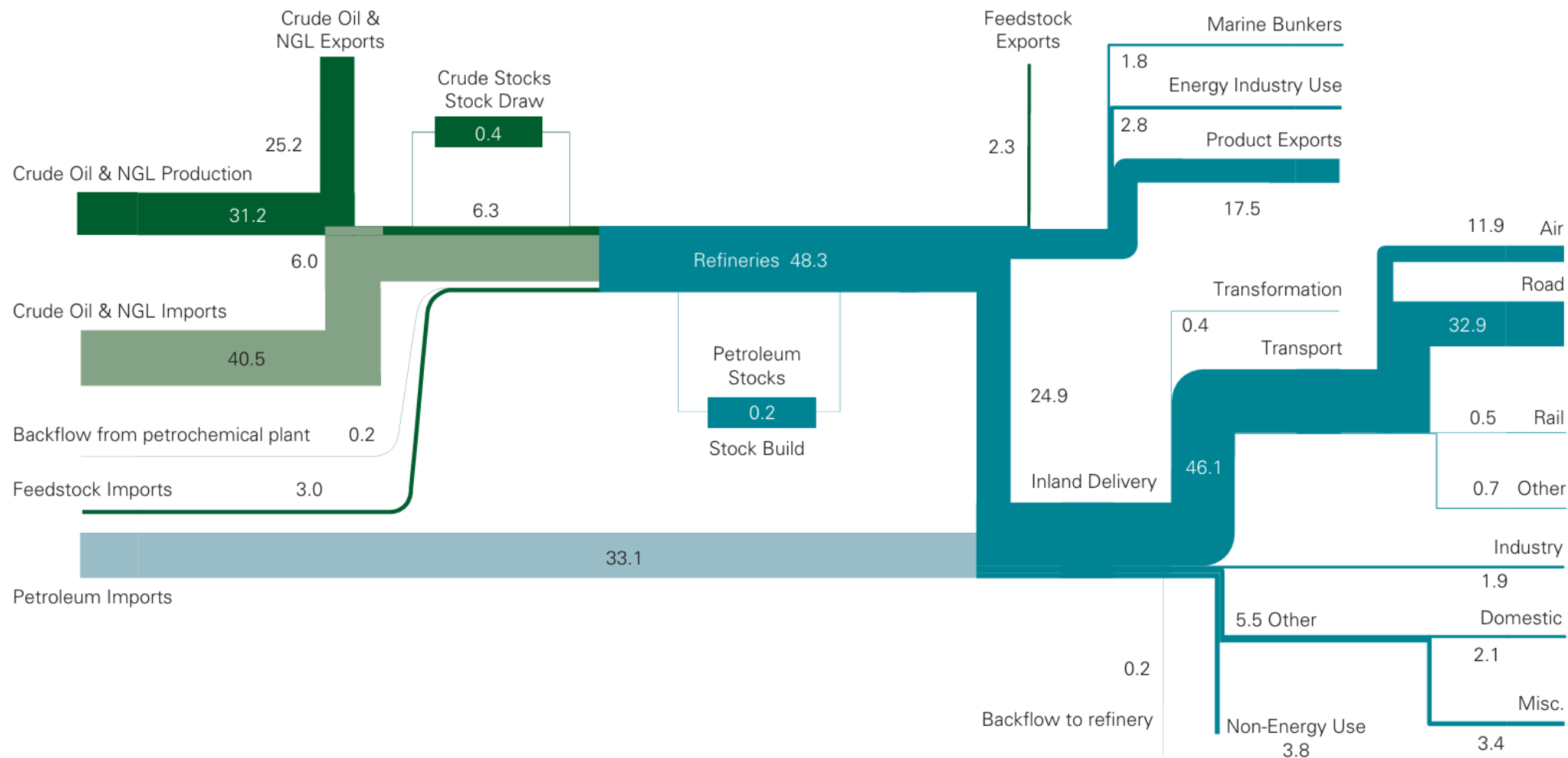
The UK held 11.2 million tonnes of stocks at the end of 2025 ([DUKES Table 3.5](#)), more than enough to meet the required 90 days of net imports stipulated by the International Energy Agency. UK oil stocks were similar to 2024, falling by 0.5 per cent on the year before. This was a result of a 6.3 per cent reduction in crude and process oil stocks partly offset by a 5.0 per cent increase in petroleum product stocks. In 2025, the Grangemouth Refinery transitioned to an import terminal and the Prax Lindsey Oil Refinery closed, which contributed to the 23 per cent fall in crude oil held at refineries.

Companies may choose to hold stocks within the UK or abroad via legal agreements with other countries. At the end of 2025 the UK held 9.2 million tonnes (82 per cent) in the UK, with most of that held abroad being in the Netherlands, as well as in Germany and Belgium.

Chart 3.6 shows the drop in stocks in 2021, which followed the end of the EU transition deal (when stocks were held at 60 days of demand) and the UK moved to the IEA stockholding system (requiring 90 days of net imports).

The flow chart shows the movement of primary oils (on the left) into refineries which are then transformed and consumed by various sectors of the UK economy (on the right), in addition to trade. The widths of the bands are proportional to the size of the flow they represent.

Petroleum flow chart 2025 (million tonnes)



Notes:

This flow chart is based on the data in Tables 3.1 and 3.2.

The numbers on either side of the flow chart will not match due to losses in transformation.

Biofuels are not included.



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